

Survey Tool Overview

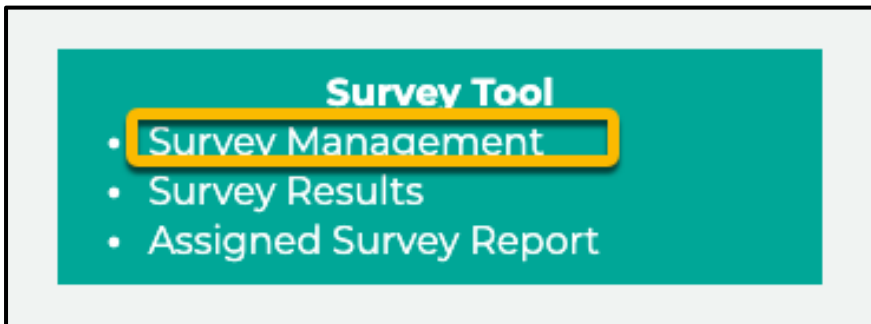
The 321 Insight Survey Tool allows you to create customized surveys you can assign to all staff, to groups, or to individual users to capture information to support your implementation goals. This resource guides you through the steps to create and assign surveys, and access and export the results.

Begin by logging into your 321 Insight account and clicking the **Manager link**.



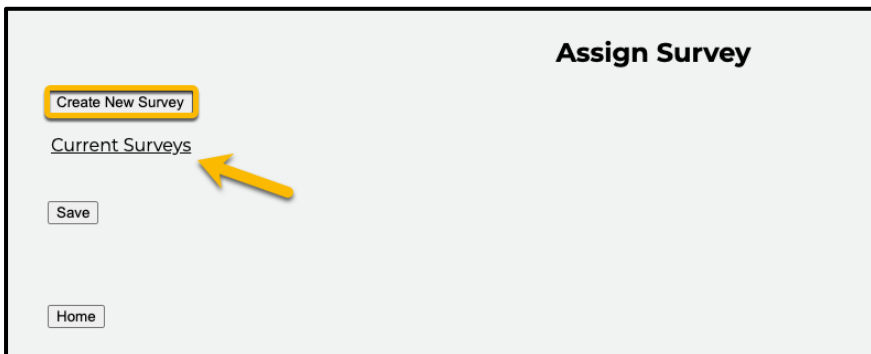
Your **Manager Tools** are located to the right of your “at-a-glance” usage report.

Creating a Survey



Under **Manager Tools** on the right:

- Scroll down to the **Survey Tool**
- Click **Survey Management**



The **Assign Survey** screen displays:

- Any existing surveys will display under **Current Surveys**
- Click **Create New Survey** to create your new multiple-choice survey

Survey

Save

Add a Question

Finished

Return to Survey Tool Without Saving

Detailed description: This screenshot shows the initial survey creation interface. A yellow box highlights the empty 'Survey' title field. A yellow arrow points from the 'Save' button to the 'Add a Question' button. Another yellow arrow points from the 'Add a Question' button to the 'Finished' button. A final yellow arrow points to the 'Return to Survey Tool Without Saving' link at the bottom.

The survey creation page displays:

- In the field under Survey, enter a name for your survey
- Click **Save**
- Click **Add a Question** to create your survey
- Click the **Finish** button when your survey is completed
- Click **Return to Survey Tool Without Saving** to return to the survey homepage without saving your survey

Survey

Staff Starting Points

Save

Add a Question

Question

What professional learning topics are most important to you this year?

Answers

Understanding how to implement trauma-informed practices

Learning strategies to deescalate a crisis

How to strengthen relationships between staff and students

How to prevent educator burn-out

All of the above

Save

Finished

Detailed description: This screenshot shows the survey editing interface. The survey title is 'Staff Starting Points'. Below the 'Add a Question' button, a question is entered: 'What professional learning topics are most important to you this year?'. Under the 'Answers' section, five text boxes contain the following responses: 'Understanding how to implement trauma-informed practices', 'Learning strategies to deescalate a crisis', 'How to strengthen relationships between staff and students', 'How to prevent educator burn-out', and 'All of the above'. A yellow box highlights the 'Save' button at the bottom.

Create your survey:

- Add your question in the **Question** field
- Add up to five **Answers**
- Click **Save**
- Click **Add a Question** to add additional questions
- Click **Finished** when your survey is complete

Note: Questions can NOT be reordered, so don't save the survey until you have reviewed the order.

Assign Survey

Create New Survey

Current Surveys

Staff Starting Points

Assign Delete

Save

Home

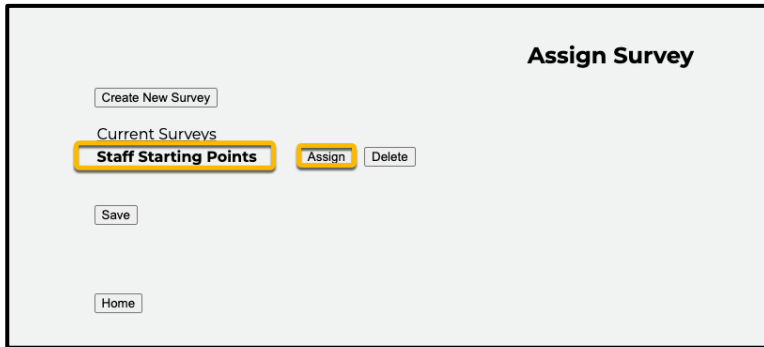
Detailed description: This screenshot shows the 'Assign Survey' page. At the top is a 'Create New Survey' button. Below it, under 'Current Surveys', the survey 'Staff Starting Points' is listed. A yellow box highlights the survey title. To the right of the title are 'Assign' and 'Delete' buttons, with a yellow arrow pointing to the 'Assign' button. Below the survey list is a 'Save' button. At the bottom left, a 'Home' button is highlighted with a yellow box.

Your survey will display under **Current Surveys**:

- Click **Assign** to assign the survey to users
- Click **Delete** to delete the survey
- Edit your survey at any time by clicking the title
- Click **Home** to return to the home screen

Assigning a Survey

To assign a survey to all staff, groups, or individuals, navigate to your **Assign Survey** screen by clicking the **Survey Management** link in your **Manager Tools**.



Assign Survey

Create New Survey

Current Surveys

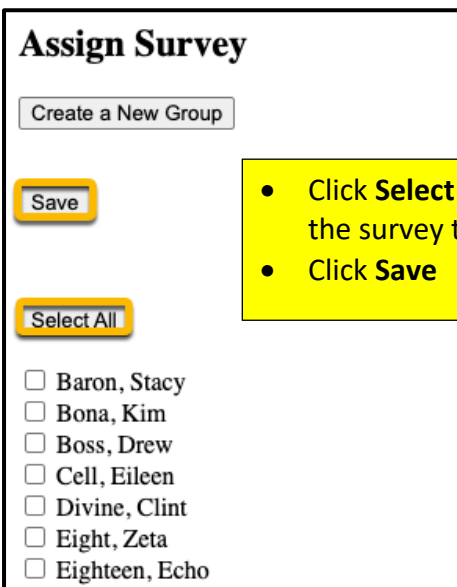
Staff Starting Points Assign Delete

Save

Home

Your survey will display below **Current Surveys**:

- Click the **Assign** button to assign your survey



Assign Survey

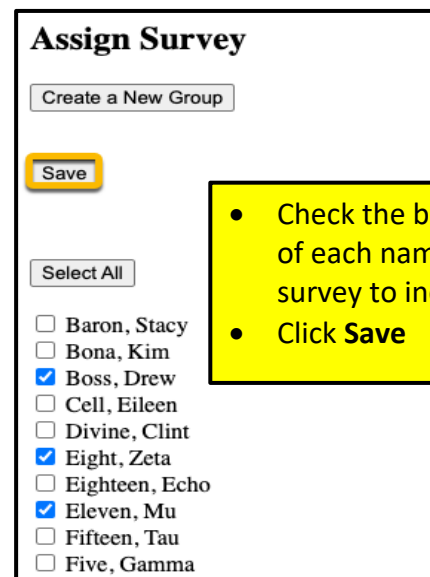
Create a New Group

Save

Select All

Baron, Stacy
 Bona, Kim
 Boss, Drew
 Cell, Eileen
 Divine, Clint
 Eight, Zeta
 Eighteen, Echo

- Click **Select All** to assign the survey to all staff
- Click **Save**



Assign Survey

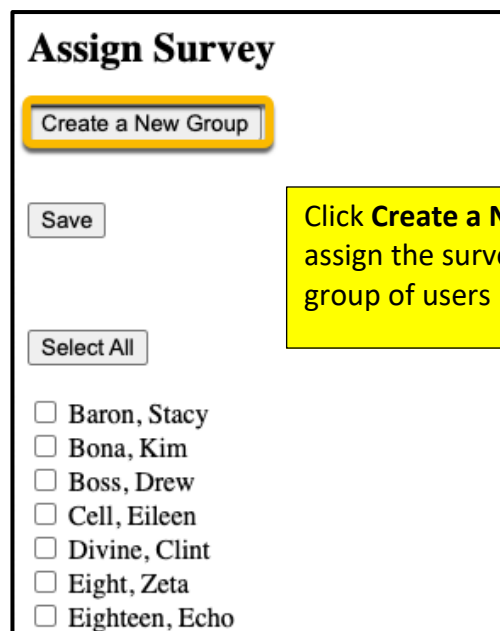
Create a New Group

Save

Select All

Baron, Stacy
 Bona, Kim
 Boss, Drew
 Cell, Eileen
 Divine, Clint
 Eight, Zeta
 Eighteen, Echo
 Eleven, Mu
 Fifteen, Tau
 Five, Gamma

- Check the box to the left of each name to assign the survey to individual users
- Click **Save**



Assign Survey

Create a New Group

Save

Select All

Baron, Stacy
 Bona, Kim
 Boss, Drew
 Cell, Eileen
 Divine, Clint
 Eight, Zeta
 Eighteen, Echo

- Click **Create a New Group** to assign the survey to a specific group of users

Creating Groups

To create groups, click the **Create a New Group** button. The group creation window will display.

Group Name:

Return to Assignments

Bona, Kim
Boss, Drew
Eleven, Mu
Fifteen, Tau
Five, Gamma
Fortyfive, Renee
Fortyfour, Bryan
Fortysix, Hailey
Fortytwo, Ashley
Four, Beta
Fourteen, Sigma
Hollifield, Cassandra
Kiska, Threatt
Lataura, Gregory
Lyons, Joshua
Lyons, Maggie
Lyons, Maggie
Lyons, Mike

Group Members:
Baron, Stacy
Forty, Danny
Fortyone, Drew
Fortythree, Anthony

Submit

- Enter a name for your group in the **Group Name** field
- Select members for your group by clicking each name. Use standard “shortcuts” to select multiple names at once
- Click the right arrow to move selected members into the group
- Deselect group members by clicking each name and clicking the left arrow
- Click **Submit** when finished
- Click **Return to Assignments** to return to the Survey Assign screen

Assign Survey

Create a New Group

Groups

New Staff

Delete

Save

Select All

Baron, Stacy
 Bona, Kim
 Boss, Drew
 Cell, Eileen
 Divine, Clint

- Your new group will display on the **Assign Survey Screen**
- Click **Delete** to delete the group

Access your survey results by navigating to the **Survey Tools** section on your **Manager Tools** screen.

Survey Tool

- Survey Management
- Survey Results
- Assigned Survey Report

- Click **Survey Results** to view completions and responses to survey questions
- Click **Assigned Survey Report** to view a report survey results and the users to whom each survey was assigned